

The Heart of Wales Line Trail

Report of Focus Groups held in Llandovery November 2018

Led by Professor Les Lumsdon, Trail Steering Group.
With Rachel Francis, Heart of Wales Line Development Co





INTRODUCTION

The Heart of Wales line runs through dramatic scenery of mountains, forests, wild rivers, green meadows and pretty towns and villages across Shropshire, Powys, Carmarthenshire and the City and County of Swansea. There is a limited but regular train service along the line operated by Transport for Wales.

The train service has long been popular with walkers, providing access to great walking country. In 2015 a small steering group of keen walkers and volunteers set out to design and build a long distance walking trail. The intention was to make all segments of the route accessible by train, with each segment designed to take walkers from one station to the next. The completed trail would run from Craven Arms all the way to Llanelli, via 141 miles of existing and upgraded rights of way. The project caught people's imagination and received widespread support. Four years later and the final section of the trail is due to open - in March 2019 - with a HWL Trail route book, published by Kittiwake and written by trail designer Les Lumsdon scheduled to hit the bookshops at the same time.

In 2018, The Heart of Wales Development Company set up a small pilot project to help develop strong, supportive links between the Heart of Wales Line walking trail, the railway and local towns. In particular, we wanted to take a close look at how we might bring in local businesses in order to make best use of passing trade generated by the trail, enrich the walking experience and help us market the Heart of Wales Line to visitors. The pilot project, focussed on the town of Llandovery, has been designed to be replicable at other strategic towns along the line.

There were three elements to the pilot project:

- Design a poster to provide information about the Walking Trail on Llandovery and neighbouring stations and brokered an agreement with Transport for Wales to use spare notice boards on stations up and down the line for these posters.
- Design a tourist information pack which includes HWL timetable, general trail leaflet and HWL Trail route descriptions for segments either side of Llandovery.
- Devise a replicable way to work with local businesses and walking groups in order to work more closely together for the benefit of rail, trail and local enterprise.

Following discussions with the trail steering group we decided to invite walkers and appropriate local businesses/enterprises to attend a carefully planned focus group at The Castle Hotel, Llandovery. Two separate focus group sessions were led by Professor Les Lumsdon. Here is the report on our findings.

Rachel Francis, Heart of Wales Line Development Co
December 2018

It is estimated that in 2009 there were 28 million walking related trips to the Welsh countryside and coast. The estimated overall spend by people on walking trips in 2009 was £632m

That amounts to £275m of gross value added;
and around 11,980 person-years of employment.

The same study found that walking accounts for around 16% of the total tourism GVA in Wales, with domestic overnight visitors staying away from home in Wales as the major contributors.

Source: The Economic Impact of Walking and Hill Walking in Wales
Produced by the Welsh Economy Research Unit. Cardiff University.





EXECUTIVE SUMMARY

The Heart of Wales Development Company organised two focus groups to seek views as to how the Heart of Wales Line Trail might benefit tourism development in the Llandovery area.

The first (supply) group included tourism businesses and elected representatives from the town and county council, projecting the views of those supplying services and facilities. The second (walker) group included walkers who have experience in organising walking breaks, leading walks and dealing with rights of way matters.

In both groups, there was considerable support for the development of the trail and how it relates to the town. They strongly supported the need to promote the trail at a local level in particular online, but also with leaflets and the route guide. They also saw great potential to market the trail more widely, in particular via the Transport for Wales network (eg posters on bigger stations such as Swansea, Shrewsbury and Cardiff Central) and by positioning the rail trail and all local services associated with the trail as a 'destination' crossing the "Wales Way" (Visit Wales marketing initiative).

The supply group focused on ways in which segments of the trail - from station to station - could be part of local tourist promotional materials - something for local tourist related businesses to hand out to visitors. There was also discussion around other activities, such as cycling, which combined with walking would encourage an extra night or two stay in the area.

The railway is regarded by supply groups as a tourist attraction in its own right and it is important that Llandovery station offers improved interpretation about the trail.

The supply group also noted the need to market the trail and railway to the car borne market and staying visitors.

The walker group spent more time discussing the likely market for this trail, concluding that it would be primarily day or short break walkers and families. Some felt that the trail would not appeal to those seeking a challenge.

The expectations of walkers were also discussed. Walkers would be seeking paths without problems, security, and a pleasant landscape. There was a need for more information, a necessary upgrading of route furniture and signage to meet expectations, and for waymarking throughout. There was also a need for ready access from stations and car parks.

There was a group consensus that potential user groups would welcome a website where material could be downloaded, used to plan a day or short break using the railway and trail. There would be a smaller market seeking a longer distance walk and they would require more detail.

This group discussed the need to learn from other well established trails so as to encourage the establishment of trail support businesses such as bed and breakfast/camping, caterers and luggage transfers.



Organisation of the focus groups

The idea of a focus group is to engage respondents in a focussed discussion about a product service, or in this case, leisure and tourism provision. It is a technique used widely in business and sometimes in a societal context to seek new insights, creative thoughts and freely offered opinions from selected respondents. This is often a preferred method when general qualitative opinions are sought rather than detailed personal viewpoints as might be ascertained in a depth interview.

Two focus groups we organised in Llandovery on November 29, 2019 at the Castle Hotel. The groups were designed as follows:

- . (a) Firstly one was recruited from the tourism sector and included town and county council representation involved in Llandovery as a destination. There were 10 respondents present at this focus group, mainly from Llandovery itself but also the surrounding rural areas,
- . (b) The second group. Was recruited from a wide range of walkers, i.e. those with a known background of walking, mainly through organising and leading walks. There were 12 respondents present at this group, drawn principally from rambler organisations located along the Heart of Wales line including Shrewsbury and Swansea.



The results from the tourism supply focus group

“ The trail in itself should attract people and will per se be an attraction in its own right. In Myddfai we hope to gain from people stopping off for food and drink.”

“... the personal touch is important. Having people on the station or in local places who will tell visitors about the trail or where to get a nice evening meal or go for a decent campsite. Llandovery station cafe does this well, it has friendly, helpful people.”

TOURISM AND LLANDOVERY

The group was initially asked about tourism development in Wales and more importantly in the Llandovery area. There was consensus that there is far more potential for tourism across Wales and particularly in Llandovery.

Many respondents considered that visitors were attracted to the Brecon Beacons National Park or Pembrokeshire but were less well informed about destinations in between. In terms of positioning the destination to the visitor, it was agreed that Llandovery is part of the Brecon Beacons and is a gateway to Carmarthenshire. Another participant also noted that it was one of the towns offering access to the Cambrian Mountains. A different dimension was discussed. The town has been successful in hosting events such as the Llandovery Motorbike Weekend and the Sheep Festival and these are becoming more important: *“there’s almost something every single month.”*

There was a strong consensus that there is potential to grow the market, but there needs to be more promotion and improved signage to inform visitors as to the tourism offer hereabouts.

In this connection the tourism office is considered to be crucial and will be staffed daily in 2019:

“If we open all year, we can grow...fill the gaps that were not exploited by the Brecon Beacons National Park.”

When visitors discover Llandovery and its surrounding area they are pleasantly surprised both in terms of the landscape and what is on offer. Llandovery tourism providers offer a personal touch and that was important in a marketplace where impersonal is becoming the norm.

When asked what visitors are looking for in Llandovery, the responses featured walking principally, but also heritage in the form of castles, churches and also special places such as Myddfai in relation to the physicians and also the Dolaucothi gold mines. In Llandovery, the various independent shops were also noted as an attraction.

There was a consensus that the main appeal is relaxation and opportunities to undertake activity in the countryside:

“they want the relaxation...it is quiet, they go walking and cycling. We send people up to Crychan forest.”

Cycling is becoming more important, not only as a result of the Tour of Britain passing through in 2018, but also because Carmarthenshire is developing cycle tourism.

THE RAILWAY AND TOURISM

There was a strong consensus that the railway was important for tourism in Llandovery referring to charter trains as well as a daily service. The railway is very appealing in that it is one of the most scenic rural lines in the UK, is good for rainy days; luggage and dogs can be taken on board with ease and in comparison to other lines fares are relatively cheap for the visitor.

Having said this, several people commented that the railway needed a lot more care so as to avoid disruption as a result of weather conditions bringing down branches onto the line. There is a need for a clearance of some line-side trees to improve safety and visibility from the carriage windows. They also felt that the timetable was a major drawback for many visitors; there were too few trains:

“The timetable puts people off...train operators want people to use the Marches line.”

LLANDOVERY AS A WALKING DESTINATION

There were a number of comments which highlighted walking as important to attract visitors; respondents cited routes into the Cambrian Mountains, routes around Crychan Forest as well as local walks promoted in a previous local publication (now out of print) and in a recently published Kittiwake book. Another respondent felt that Crychan Forest was ideal as it is not busy; it can be very quiet and there was a case for linking in with the trail as it passed through the forest.



There had been a notable increase in walkers in recent years:

“There is a huge difference in the amount of walkers now than in previous decades, when perhaps they only walked between hostels. There are a lot more older people walking, say in their 50s and 60s. There’s also a winter market.”

It was considered that Llandovery would not be as popular as places such as Pen-y-fan in the Brecon Beacons, but that there was greater potential than at present. Some commented that demand had weakened this autumn perhaps because of uncertainty about matters such as Brexit or the poorer weather in recent weeks.

THE HEART OF WALES LINE TRAIL

There was also recognition that the trail would bring more trade:

“The trail in itself should attract people and will per se be an attraction in its own right. In Myddfai we hope to gain from people stopping off for food and drink.”

Another respondent referred to a local activity centre with accommodation near Cyngordy railway station where they have already had 20 people expressing interest in walking the trail next year.

The tearooms at the station regularly receive groups of walkers from the Llanelli area especially during the winter months when the free travel offer for seniors applies. There are far more customers in the café at this time.

“Publicity has a big part to play; since an article (on the trail) in the Telegraph appeared more have come by train to walk. Of course, the internet is key too.”

The group considered there to be a lack of information about the trail at present. The facilitator advised the group that there was a new leaflet in print, a Kittiwake guidebook coming out early next year. The staff at the station tearooms indicated that visitors currently want a leaflet. The digital age might well be more appropriate for a younger market but the older age groups still preferred printed material.

The idea of linear walks was discussed. The appeal of getting on a train to the next station had special appeal; there were many enthusiastic railway supporters who liked walking. However, some respondents noted that there was also a need to cater for those who wanted more local walks, a sampler featuring a short section of the trail with a return leg.

There was also a need for a rail and walk and rail and cycle package or a walking and cycling package. At present there was no one to facilitate this, but the idea suits what more casual market wants:

“we are scratching the surface...there is scope to widen the appeal to fishing, birdwatching and other outdoor pursuits.”

The trail is only part of a wider package to encourage outdoor tourism, perhaps using the trail and railway as a walking corridor. Another respondent asked if Huw Edwards would do a commentary video for the town.

LINKAGES WITH THE TOWN

The group came back to discussing promotion as the key need for the trail, railway and its relationship with the town. The focus should be on staying visitors as well as the day market.

“We get many people who are staying in the two caravan/camping sites near town. Most of these people, principally Welsh people, are looking for place to go and have bus passes which can be used...It is about giving people the confidence too. That is why leaflets are so important. Without a leaflet showing people where to go we are less helpful.”

Another person cited the example of the Heart of Wales Line Window Gazer which had been reprinted several times.

Others in the group felt that there was a need to emphasise the internet more as this is the first port of call for intending visitors.

There was some agreement that both would be needed at this stage in tourism market development.

Accommodation providers also felt that it was vital to encourage people to stay longer by offering opportunities such as walking on the trail for a day.

“We should not just think of one day visits or one nighters, longer stayers spend more.”

Another respondent said that it was important not to forget that most visitors arrive by car and that there would be a need to encourage them to try the railway for a trail walk;

“Car users may be reticent about buses and trains. If you can make it easier for them that would be good.”

The group was asked to comment about the types of promotional material the Development Company might devise. One respondent referred again for the need for themes to attract the walker, that if a linear walk was preferred it should have walking instructions so that visitors had all the information they needed in their hands. A train ride to Cyngordy and walking back or alternatively to Llangadog would work well:

“It is never the same journey twice...the light is always different.”



One respondent noted that if the trail attracted people to stay for an extra night it would generate £50 plus on a meal, drinks and accommodation for those staying at a camp site, over £100 for those staying at a Bed and Breakfast or small hotel. There was also agreement that long distance walkers would bring a sizeable spend with luggage transfers, food and accommodation. Several respondents argued the need for a 2 or 3 day rail ticket for the line (Swansea to Shrewsbury Rover) and others for some light packaging of walks on the trail by a tourism provider with the railway.

This led to a suggestion that Transport For Wales should invest in left luggage at stations (like Amazon lockers for example) so that luggage could be dropped off for the walker to pick up after a day's walking

The results from the walkers group

EXPECTATIONS ABOUT TRAILS

The group was asked about other trails they had walked or had knowledge about. These included the Cambrian Way, North and South Downs Way, Offa's Dyke Path, Pennine Way, South West Coast Path, Wales Coast Path, West Highland Way as well as the Tour du Mont Blanc in Europe. Most of these are long standing national trails. Several group members said that they had used a combination of train, bus and car share to access walking sections of trail.

It then discussed the different markets attracted to trails. For example, on established paths such as the Pennine Way there was an image of people walking long distances with a heavy back pack across well-trodden upland moors. This is a very different market, and possibly a shrinking one, to those seeking to walk sections of the trail, perhaps as a day visit or series of short breaks. These sections might be known for their scenic value or heritage appeal.

WHY DO WALKERS CHOOSE TRAILS?

A number of reasons were given, for example knowing that the route would be open rather than obstructed; knowing it would be way-marked, and with information instils a confidence especially in Mid Wales where many paths may well be obstructed:

"Security, rights of way not going to be an issue, dogs secured in farmyards..."

"it is about being on a footpath which you know will be open, plenty of gates rather than stiles...gives a cache that it has to be good."

The issue of signage was also discussed as to whether finger posts should highlight distances or times between named places. In addition, the number of way-mark posts used and type of way-mark was important. The example of the Epynt Way was cited as best practice as each way-mark post is numbered individually and topped with a yellow cap for visibility.

"People do not want ambiguity...it has to be clearly way-marked. How many will go the expense of buying a guidebook?"

There was also a need for a balance between a trail which people like to walk and capacity. Some trail are too popular and this reduces the sense of place, the appeal of the surrounding countryside. The concept of a linear trail is appealing, not having to walk back to a start point on a less attractive route, and the Heart of Wales fits this well.

There was, however, a concern about the level of demand experienced on some trails. The West Highland Way was cited as being a trail which is very busy ("like a motorway") and one respondent described some trails where there were unacceptable "honeypots"; they are so busy as to be avoided:

"The High Peak Trail, for example, is full of walkers, bikes, kids and buggies and it is like being in a city!"

HEART OF WALES LINE TRAIL

Several other respondents argued that the Heart of Wales Line Trail would not be that busy as it was not in proximity to large urban areas or other walking locations such as Pen-y-fan near Brecon which attract overwhelming numbers of walkers and visitors, plus increased commercial interest resulting in pressures on the landscape.

"You can walk the Epynt Way and not see a soul...we don't see that many as Pen-y-fan is just down the road."

There was also a feeling that it would not be a trail which is attractive for a "completist", i.e. walkers looking for a harder challenge.

Nevertheless, many commented that there would always be a small market which seeks to walk the entire trail:

"Some people like to tick off something...a trail."

"A very small number of people doing the Cambrian Way stop off at my campsite, they usually stop off to have a shower, a meal and break...it is a very small market."

"The younger lot might want to wreck themselves for a week on the trail, bivouac or B&Bs....but the older market not so..."

There was consensus that the trail should appeal to walkers who are looking for peace and quiet and not a hard slog; they would be interested in the landscape and culture as well as the railway. This was referred to as the "tentative market"

One respondent also noted the need to cater for casual walkers on the trail seeking shorter sections to sample it in circular walks, for example around Llandovery. It was also noted that cycle tourism is being developed in the town too and train, cycling and walking could be an attractive package:

"lots of visitors who are not dedicated walkers might like to try the trail...offer them something to dip into and for dedicated walkers as well."

One respondent also pointed to the sustainable nature of the trail in that walkers will be encouraged to use trains (and some buses where appropriate) to walk sections of the trail; it is a good example of sustainable tourism. This could be enhanced by suitable interpretation, for example, at stations.



TRAIL TYPOLOGY

The question of the status of the trail was raised. Is it local, regional or national? The respondent felt that it was more likely to fit into a category of a regional trail with moderate demand, sufficient upgrading to meet this need, but not as high a status as a national trail or Grande Randonnée. It would be of the standard perhaps of the Wye Valley Walk or Beacons Way.

“Grande Randonnée...not sure if we'll live long enough to see the Heart of Wales route being one of the premier routes. We are not a Pennine Way or South Wales Coast route or others which the man in the street can name!” There was a consensus that this was right. There would be a need for ongoing monitoring and maintenance to ensure that a standard is maintained. This would have to include agreements with other trail providers when the route is shared. Examples of the Shropshire Hills Discovery Walks, the Severn Way in Gloucestershire and Mortimer Trail in Herefordshire were cited to illustrate how promoted walks and trails can fall into decline without appropriate attention to maintenance. This reinforced the point:

“Permanence is vitally important”

In this context, the group asked regarding the position in Powys. The facilitator explained that the current policy was not to allow bespoke trail markers on the Heart of Wales Line Trail. There was concern regarding this; one respondent referred to the lack of resource available and this would explain the reluctance of the county to take on responsibility for more trails. There is at the moment a consultation regarding the updating of the Powys CC Rights of Way Improvement Plan and anyone can send in their comments at this stage. One respondent felt that the current policy is against trail development. The Trail Steering Group is working with Powys CC to seek permission for the use of bespoke waymarks on the trail, but as yet the outcome has not been determined.

THE TRAIL AND TOURISM SECTOR

The example of the West Highland Way was given as a way forward where local bed and breakfast providers worked together to offer accommodation and luggage transfers. This would be an option for Llandovery. Another respondent asked whether it would be possible to offer luggage transfer by train. This led to a suggestion that Transport For Wales should invest in left luggage at stations (like Amazon lockers for example) so that luggage could be dropped off for the walker to pick up after a day's walking.

With regard to marketing the trail, the group considered that the long distance walking segment would come regardless, but there was a need to enhance their appetite with a website packed with lots of ideas for walking the trail, interpretation, etcetera. Several members had found difficulties locating the trail website, being thrown by search engines to the website for the Heart of Wales Line. There would also be a need to produce leaflets to encourage short breaks and day walks. In many respects the group considered that we were referring to a latent market for a trail which is closely associated with a railway. There were examples of rail based walks, for example, the Cambrian Coast and Settle and Carlisle lines, but the Heart of Wales was unique in being a rail based long distance trail.

There was a strong consensus that the HWL Development Co/Transport for Wales should look to marketing the trail at stations and on trains servicing that line and the Marches line, possibly extending to Carmarthen, Bristol Wolverhampton and Liverpool too. This might be in the form of station and on board posters. There is definitely a need for greater information at stations such as Llandovery to explain the trail to walkers.

WALKERS AND VISITOR SPEND

One respondent noted that day walkers would not spend very much in Llandovery or elsewhere. However, a counter point was made. The frequency of trains is so poor that often walking groups stay for an hour or two in local towns and villages buying food and drink after their walk is complete. It was considered that day walkers visiting the area by car would spend far less:

“Car users coming to walk bring peanuts...”

Another person cited an example in Llanwrtyd when a walking group of twenty stayed for a meal and drinks before catching the last train. There was also the aspect of public relations. If walkers had a good experience they would return for a weekend walking break; this it was argued had a monetary value.

However, the discussion focussed on the staying market and one respondent noted that if the trail attracted people to stay for an extra night it would generate £50 plus on a meal, drinks and accommodation for those staying at a camp site, over £100 for those staying at a Bed and Breakfast or small hotel. There was also agreement that long distance walkers would bring a sizeable spend with luggage transfers, food and accommodation.

Several respondents argued the need for a 2 or 3 day rail ticket for the line (Swansea to Shrewsbury Rover) and others for some light packaging of walks on the trail by a tourism provider with the railway.

The group concluded that there is real potential for the trail but it would require improved marketing.

Appendix 1. Attendees

Supply Group

Llandovery Station/Tea Rooms

Glyn Evans

Joan Snaith

Mary Hargreaves

Myddfai Community Centre

Robin Barlow

Basel Cott Holidays

Sue Mc Gill

Carmarthenshire County Council

Cllr Handel Davies

Llandovery Town Council

Gill Wright

Local B&B

Jill Blud

Walker

Pat Williams

Crychan Forest

Chris Laing

Walkers Group

Exploring Mid Wales

Rob Rees

Epynt Way

Rupert Prince

Lucy Fairfax

Andy Bull

Dinefwr Ramblers

Jude Charteris

Jim Shadbolt

Swansea Ramblers

Dave Bird

Rail Rambles

Doug Hill

Steve Paynter

Alan Hill

Llandovery Walkers are Welcome

Robin Barlow

Erwlon Camping

Peter Rees